

FILING A DOCUMENT/DOCKETING- PLAN

EXAMPLE: CHAPTER 13 PLAN

[Local Rule 2002-1\(b\)](#)

The following instructions will guide you through the process of filing and docketing a document or a “Plan” event in the Electronic Case Filing (ECF) system.

STEP 1 Select **Bankruptcy** from the Main Menu, and then click on **Plan** hypertext link.

STEP 2 The **Case Number** entry screen appears.



- ◆ Enter a case number, and click on the **Next** button to continue.
- ◆ If the computer prompts that you entered an invalid case number, click on **Back** hypertext link to re-enter.
- ◆ Click on **Next**.

STEP 3 The **File a Plan** screen appears:



- ◆ Using up and down arrows to right of box, scroll the options to highlight the type of document being filed.
- ◆ Click on **Next** to proceed, or **Clear** to repeat selecting.

STEP 4 This screen allows you to select whether or not you are filing the Plan with a joint attorney.



This screen is used only if another attorney is joining in a filing. If you are the only trustee/attorney filing this application, skip this screen by clicking **[Next]** and proceed to **Step 5**.

- ◆ If this is a joint filing and the box is checked, a listing of attorneys presently on the case will be presented for selection.
- ◆ Click **[Next]**

STEP 5 Select the Party screen appears



- ◆ If the name of the party/filer is listed, click on the name(s), click on **Next** and then proceed to **Step 8**. [If the selection box is full, use the scroll arrows to further search for the party name(s)]

To select more than one name from the list, hold down the Ctrl key and use your mouse to click on the names.

If the name of the party/filer is not listed, click on **Add/Create New Party**

- ◆ The **Search for a party** screen appears.



- ◆ Enter a social security number (SSN), Tax Id number or one to four letters of the party's last name or business name (using upper case characters).
Click on **Search**
- ◆ The **Search for a party (party results)** screen appears

- ◆ If name(s) is not listed, click on **Create New Party** and proceed to **Step 6**.
- ◆ If the name(s) is listed, click on it. Click **Select name(s) from list**.
- ◆ Party's information appears for verification and modification, if necessary.
[This screen appears every time you select a party that exists or has been added to the system.]
- ◆ Click on drop box, **Role**, to select appropriate party role, (i.e., Debtor, Creditor, etc.).
- ◆ To add **Party Text**, such as A Montana Corporation, do so now in box provided
- ◆ Click on **Submit** to continue, **Clear** to re-key party information or **Cancel** to go back to the **Select the Party** screen.
- ◆ Proceed to **Step 8**.

Step 6 Party Information screen appears:

- ◆ Enter the party information in appropriate fields. Use the *Last Name* field for last name or full business name, then press the tab key to advance to the *First Name* field and enter first name. Proceed to the **Role** field by clicking on the arrow to the right of the box to select the new person's role, (i.e., Creditor (cr:cr)).

- ◆ Click on **Submit** to continue, **Clear** to re-key party information or **Cancel** to go back to the **Select the Party** screen.

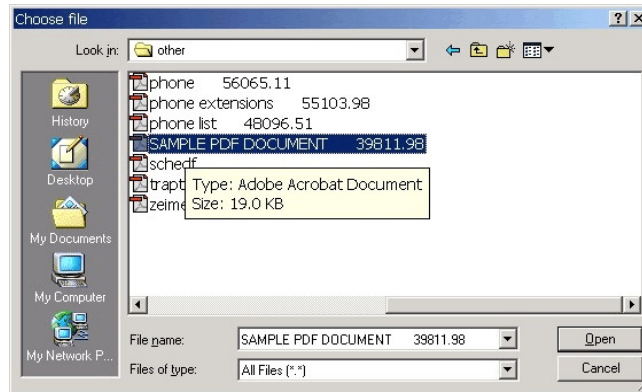
STEP 7 The **Select the Party** screen appears with your party highlighted. Click on **Next**.

STEP 8 The **attorney/party association** screen appears

NOTE FOR ASSOCIATION: Click the box to associate the attorney with the party added/selected. Click **NEXT** to continue. [You may receive this message if an attorney has not previously been associated with the party].

STEP 9 **Select the PDF Document** screen appears.

- ◆ Type the file name in the blank box, being sure to include pdf suffix, or click on **Browse**. The Choose file screen will appear:



- ◆ Change **Files of type:** to Acrobat [*.pdf] or All Files.
- ◆ Change **File name:** to appropriate drive where document is located.
- ◆ Click on file name to be associated with this entry. Right click and **Open** to view document.
- ◆ Double Click or Click on **Open**. The following screen appears:

If there are attachments to document, e.g. exhibit, appendix, etc.

- ◆ Click on the radio button next to **Yes**.
- ◆ Click on **Next**.

STEP 10 Select one or more attachments screen appears. All exhibits must be attached at this screen:

Select one or more attachments.

1) Enter the pdf document that contains attachment (for example: C:\appendix.pdf).

Filename

W:\imaging\other\SAMPLE PDF DOCU

2) Select a document type and/or enter a description.

Type	Description
<input type="text" value="Affidavit"/>	<input type="text" value="Joe Banker, First Citizens Bank"/>

3) Add the filename to the list box below. If you have more attachments, go back to Step 1. When the list of filenames is complete, click on the Next button.

- ◆ Select the filename of your attachment by using **Browse**.
- ◆ Click on the ▼ down arrow next to **Type** and click on type of attachment.
- ◆ Click in **Description** box and type in any additional description.
- ◆ Click on **Add to List**.
- ◆ Continue to *Add Attachments* using the above steps as necessary.
- ◆ Once all attachments have been added, click on **Next**.
- ◆ The following screen appears.

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

File a Plan:

02-00011 RACE HORSE

Complete the Final Docket Window with the DATE Specified on the Plan

Note: You are instructed to complete the final docket text window with the name date specified on the Plan.

- ◆ Click on **Next**.
- If there are no attachments to document:**
- ◆ Click on **Next** and the following screen appears. Proceed to **Step 11**

Note: You are instructed to complete the final docket text window with the name date specified on the Plan.

- ◆ Click on **Next**.

STEP 11 Docket Text: Modify as Appropriate screen appears.

- ◆ Type the name of the date of the Plan in the docket text window.
- ◆ Verify docket entry as it appears on screen.
- ◆ If correct, click on **Next** to submit filing to court.
- ◆ If docket entry is incorrect, press **Back** to make corrections, or start over by clicking on **Bankruptcy** on the main menu bar.
- ◆ Click on **Next**.

STEP 12 Docket Text: Final Text screen appears.

- ◆ Verify docket entry as it appears on screen.
- ◆ If correct, click on **Next** to submit filing to court.
- ◆ If docket entry is incorrect, press **Back** to make corrections, or start over by clicking on **Bankruptcy** on the main menu bar.

Receipt of Filing

Once entry is submitted after final approval, the **Notice of Electronic Filing** screen appears. This screen gives confirmation that the system has received the entry, and the entry now is an official court document. Scroll down to view entire receipt.

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

File a Plan:
[02-00011 RACE HORSE](#)

Notice of Electronic Filing

The following transaction was received from SAMSON, RICHARD entered on 11/22/2002 at 11:06 AM MTN and filed on 11/22/2002

Case Name: RACE HORSE
Case Number: [02-00011](#)
Document Number: [26](#)

Docket Text:
Chapter 13 Plan dated 11/14/04 Filed by RACE HORSE. (SAMSON, RICHARD)

The following document(s) are associated with this transaction:

Document description: Main Document
Original filename: W:\maging\Archive\Friday\ap-n0-01-40790 30875.05.pdf
Electronic document Stamp:
[STAMP bkecfStamp_ID=986323682 [Date=11/22/2002] [FileNumber=411-0] [114b3c546260bc93d17b91905db2bca96a60d7c36:3b2b32d87cf820ba8295ee9792476c88b57420f6f4153d603fdb99e1b45882a50c285a06f0af38182da2]]

02-00011 Notice will be electronically mailed to:

JAMES A. PATTEN japatten@yahoo.com
RICHARD SAMSON samsonrj@yahoo.com,

The **Notice of Electric Filing** appears each time you submit a filing to the court through the ECF System. Each notice will include the following:

- ◆ Who filed the document:
- ◆ Date and Time:
- ◆ Case Name:
- ◆ Case Number:
- ◆ Document Number:
- ◆ Original filename (*pdf*):
- ◆ Electronic document Stamp:

Print receipt

- ◆ Click on **File** at top of Internet Explorer screen and select **Print, or**
- ◆ Click on the Printer Icon at the top of the page.

[Note: It is highly suggested that copies of receipts be maintained for your records]